

REQUEST FOR SUPPLIER QUALIFICATION



The Children's Aid | La Société de l'aide  
Society of Ottawa | à l'enfance d'Ottawa

**REQUEST FOR SUPPLIER QUALIFICATION**

**With**

**THE CHILDREN'S AID SOCIETY OF OTTAWA**

**PROFESSIONAL SERVICE CONSULTANTS**

**(RFP No. PSC 0-2)**

**DEADLINE SUBMISSION DATE**

**December 7, 2015**

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# REQUEST FOR SUPPLIER QUALIFICATION

## SECTION 1 INTRODUCTION

### **1.1 Proposal Documents, Delivery, and Deadline:**

Proponents are requested to submit three (3) copies of their proposals in a sealed package marked “Proposal –Professional Consultant” to be received at 1602 Telesat Court, Ottawa, Ontario K1B 1B1 before 16:00 hours, December 7, 2015.

The name and address of the Proponent must be clearly indicated on the face of the sealed package containing the proposal, along with one or more of the numbers associated with the area of specialty (ies). The total content of the Proposal, including any appendices and attachments, should be outlined in a Table of Contents at the front of the Proposal. Please refer to the Submission guide.

Proposals sent by fax or e-mail will not be accepted.

Late or incomplete proposals will not be considered.  
Submissions that do not meet the mandatory criteria will be disqualified.

There is no guarantee that qualified Vendors will obtain any volume of work, nor is there any guarantee that the qualified Vendors who are invited to respond to The Request for Suppliers Qualification will be offered the opportunity to respond to a request for proposals.

All proposals should be directed to the attention of:

Natalie Belanger,  
Executive Office,  
Children’s Aid Society of Ottawa  
1602 Telesat Court  
Ottawa, Ontario  
K1B 1B1

### **1.2 Overview**

The Children’s Aid Society of Ottawa, (CASO) is a public sector employer with approximately 450 staff members. The mandate of the Society is to protect the children

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and youth in our community from all forms of abuse and neglect under the provisions of the Child and Family Services Act, (CFSA).

The Province of Ontario provides CASO's principal funding. Under the provisions of the CFSA, the Ministry of Children and Youth Services of Ontario contracts with CASO as a transfer payment agency for the delivery of legislated Child Welfare Services in the Ottawa area. As a consequence of the contractual arrangement between CASO and the Ministry, the Ministry conducts regular reviews and audits to determine funding requirements and to exercise due diligence. Under Ontario law, the Society is also subject to audits performed by the Auditor General of Ontario.

CASO operates as a separate legal entity, at arm's length from the Ministry and is governed by an independent volunteer Board of Directors. CASO's Board of Directors is 16 members strong, and possesses the multi-disciplined representation necessary for effective governance. The Board meets regularly with Management.

The CASO is accountable to the public for the effective, efficient and responsible use of financial resources. Thus we are seeking value of our funding to ensure the most cost effective means in the contracting of Professional Consulting Services.

### **1.3 ONTARIO BROADER PUBLIC SECTOR (BPS) CODE OF ETHICS**

**Goal:** To ensure an ethical, professional and accountable BPS supply chain.

#### **I. Personal Integrity and Professionalism**

Individuals involved with Supply Chain Activities must act, and be seen to act, with integrity and professionalism. Honesty, care and due diligence must be integral to all Supply Chain Activities within and between BPS organizations, suppliers and other stakeholders. Respect must be demonstrated for each other and for the environment. Confidential information must be safeguarded. Participants must not engage in any activity that may create, or appear to create, a conflict of interest, such as accepting gifts or favors, providing preferential treatment, or publicly endorsing suppliers or products.

#### **Accountability and Transparency**

Supply Chain Activities must be open and accountable. In particular, contracting and purchasing activities must be fair, transparent and conducted with a view to obtaining the best value for public money. All participants must ensure that public sector resources are used in a responsible, efficient and effective manner.

#### **Compliance and Continuous Improvement**

Individuals involved with purchasing or other Supply Chain Activities must comply with this Code of Ethics and the laws of Canada and Ontario. Individuals should continuously work to improve supply chain policies and procedures, to improve their supply chain knowledge and skill levels, and to share leading practices.

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### **1.4 Requirements**

In the course of operations the CASO undertakes a number of initiatives and activities that are outside the core work of the Society. As a result the CASO seeks consultants with expertise in a number of areas to achieve our objectives.

#### **C-1 Organizational Planning and Development**

Organization development is a planned, organization-wide, effort to increase CASO's effectiveness and viability so that it can better adapt to new technologies, marketing challenges, and growth opportunities. By utilizing organizational reflection, system improvement, planning, and self-analysis, the objective is to improve CASO's capacity to handle its internal and external functioning and relationships.

#### **C-2 Organizational Development related to anti-oppressive practices and cultural learning**

Increasing the competency of staff and care providers in the above areas is a key organizational goal.

#### **C-3 Strategic Planning**

Strategic planning will be a road map to lead the CASO from where it is now to where it would like to be, bearing in mind the nature of the organization's leadership, and culture as it relates to complexity of the environment, opportunities and size.

#### **C-4 Project Management**

Shepherding projects and/or initiatives from the inception to implementation with a focus on obtaining key results. Includes development of a logic models and evaluation frameworks.

#### **C-5 Organizational Change Management Assistance and Strategy Development**

The intensifying competition for resources and demand for high performance are pressing the CASO to become more flexible, more results-focused, and position itself to react quickly and efficiently.

#### **C-6 Resource Management Support**

Providing expertise and support in the area of resources to facilitate recruitment, compensation, Administrative and other short-term emergency supports.

#### **C-7 Evaluation and Quality Assurance Activities**

Providing evaluation frameworks and processes of programs and service models. Support methodologies to ensure services are appropriate and have appropriate quality.

#### **C-8 Compensation/Review and Recommendations**

Providing a comprehensive review of the compensation levels for various staff positions, including senior positions with the purpose of promoting fair and equitable terms and conditions of employment.

#### **C-9 Leadership Development and Support**

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Providing coaching, mentoring and support in the development of leaders within the organization.

### **In addition to the above the following will form part of the evaluation process:**

- Experience working with Executive Directors and Board of Directors
- Geographic location in proximity to Ottawa
- Previous or existing relationship with CASO
- Years of experience
- Access to others within the proponents firm to provide additional expertise
- Experience preparing and delivering presentations summaries
- Experience coordinating, facilitating and chairing focus groups/workshops/meetings and developing related materials
- Experience liaising with a variety of internal and external stakeholder groups and/or individuals to complete the assignment
- Experience conducting quantitative and qualitative research including conducting internet and literature searches/reviews; and compiling and analyzing data.
- Risk management/mitigation skills

## **SECTION 2- GENERAL TERMS AND CONDITIONS**

### **2.1 Instructions to Proponents**

The intent of this RFSQ document is to pre-qualify proponents in the delivery of Professional Consultant Services which will result in the successful proponents being placed on a roster for future projects and initiatives. Any proponent, by responding to this RFSQ, represents that they possess the capabilities and personnel necessary to provide efficient and effective services. A contract that outlines: the terms and conditions of the requirements, the services to be performed and a fee schedule for such services will be entered into at the time a specific project or initiatives is identified.

The following format is required for the submission:

	<b>Requirement</b>	<b>Information</b>
<b>Section 1.0</b>	1.1 Letter of introduction	Proponents should identify themselves and the Lead Representative who has the authority to enter this submission. Proponents should also provide the name, title, address, telephone number and e-mail address of the authorized official to be contacted in the event clarification or further information is required.
	1.2 General Information about the individual practice or company.	Proponents are required to identify the number of Consultants within their organization, (where relevant) academic qualifications, credentials,

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		<p>and experience, from a corporate and team member perspective, as well as organizations that have engaged their services.</p> <p>Proponents are required to identify Proponents should outline their experience working with Child Welfare organizations, and identify if they have had a business relationship with CASO.</p> <p>Proponents are requested to provide information that demonstrates partnerships, and lessons learned that have enhanced future partnerships.</p> <p>Proponents should identify Membership and profile in appropriate professional groups where discipline dictates.</p> <p>Knowledge of industry standards where warranted.</p>
<p><b>Section 2</b></p>	<p>2.1 Service Delivery</p>	<p>Proponents are required to outline their approach in each of the areas corresponding with their area of specialty in <b>Section 1.3</b></p> <ul style="list-style-type: none"> <li>(i) Organizational Planning and Development</li> <li>(ii) Organization development as it relates to anti-oppressive practices and cultural learning</li> <li>(iii) Strategic Planning</li> <li>(iv) Project Management</li> <li>(v) Organizational Change Management Assistance and Strategy Development</li> <li>(vi) Resource Management Support</li> <li>(vii) Evaluation and Quality Assurance Activities</li> <li>(viii) Compensation/Review and Recommendations</li> <li>(ix) Leadership Development and Support</li> </ul>
	<p>2.2 Sample Reports/Documents</p>	<p>Proponents are requested to provide sample reports and/or documents</p>

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		<p>such as:</p> <ul style="list-style-type: none"> <li>• Strategic Plan</li> <li>• Logic Model</li> <li>• Performance measurement and reporting</li> <li>• Project Planning</li> <li>• Management program evaluation</li> <li>• Compensation/review</li> </ul>
<b>Section 3</b>	<p>3.1 Fee Schedule</p> <p>The Proposal shall include a detailed list of fees for the services to be provided.</p>	<p>List of fees associated with:</p> <ul style="list-style-type: none"> <li>✓ Consulting Service</li> <li>✓ Project Management</li> <li>✓ Training Delivery</li> <li>✓ Report Writing</li> </ul> <p>Fees for both hourly rate and per diem for the above</p> <p>Where proponents do not provide all the requested services but partner with other providers they are requested to provide the details of the suggested method of obtaining the service and the fees associated with completion.</p> <p>Where applicable, proponents are requested to provide details of additional services provided by the firm beyond the scope of the RFSQ and the fees associated to these services.</p>
	3.2 Financial Reporting Format	Proponents are requested to provide copies of their financial reporting formats and monthly invoicing methodologies.
<b>Section 4</b>	Submission format	Proponents are requested to follow the attached submission format.
<b>Section 5</b>	Preparation of References	<p>The CASO requires references. The proposal should include:</p> <ul style="list-style-type: none"> <li>✓ Three (3) business references</li> <li>✓ Experience and references from <u>Non-Profit</u> organizations and other Child Welfare</li> </ul>



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		organizations would be beneficial.
<b>Section 6</b>	6.1 Confidentiality	The obligation for confidentiality is to hold confidential all information acquired in the course of one’s work or association with the CASO and includes all aspects of the Society’s services and administration and extends to all methods by which personal information is collected, shared, recorded, used and stored by an employee or a person acting under the authority of the CASO. This includes information related to clients, foster parents, volunteers, employees and community individuals who become involved with the CASO.
<b>Section 7</b>	7.1 Insurance: Proof of Insurance that addresses the following requirements: ❖ The Proponent shall maintain Fidelity insurance of not less than \$2 million and errors and omissions insurance coverage in a similar amount of \$2 million. The Certificate of Insurance shall be provided no later than two (2) weeks after the effective date of the contract.	The Proponent agrees to indemnify and save harmless the CASO from and against all claims, demands, loss, costs, actions, suits or other proceedings by whomsoever made, brought or prosecuted in any manner based upon, occasioned by or attributable to the activities of the Proponent under the agreement to be entered into. The obligation of the Proponent to indemnify the CASO pursuant to the provisions this clause shall survive any termination of the agreement to be entered into.

**2.2 Preparation Instruction for Submission**

- ❖ All submissions must be precise and to the point. The Proponents shall provide a detailed cost breakdown, including any benefits or discounts for not-for-profit organizations. All types of services shall be listed with full details, information and costing
- ❖ The CASO reserves the right to accept any submission, or at its discretion, reject any or all submissions that do not meet the criteria, or for other reasons it deems appropriate, and may choose to interview a select number of Proponents to gain additional information.

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- ❖ All costs and expenses incurred by each of the Proponents in the preparation and delivery of its RFSQ or in providing additional information necessary for the evaluation shall be borne solely by the Proponent.
- ❖ All information in the submissions is confidential and should not be disclosed except to those evaluating the submission.
- ❖ All proponents shall be notified of the outcome of their submission and when the Vendor of Record List is established.
- ❖ Those Proponents selected for the Vendor of Record List will be invited to respond to a Request for Proposal as projects and initiatives specific to their area of specialty become available. The submission will outline costs, availability and the process to complete the task.
- ❖ A contractual agreement outlining the mutual responsibilities of the Consultant and the CASO will be entered into at the time of the selection of the consultant.
- ❖ All prices shall be quoted in Canadian dollars.

### 2.3 Final Acceptance Policy

All proposals submitted shall be the property of the CASO and may not be released in part or in total for third party evaluation unless other arrangements are requested at the time of the proposal submission. Neither the transmission of the RFSQ nor acceptance of a reply shall imply any obligation or commitment on the part of the CASO.

### 2.4 Evaluation Criteria

Each proposal will be reviewed and a selection will be made based on the following criteria:

Consultant's background, experience, academic qualifications and professional affiliation	20
Demonstrated skill and Experience in area of specialty	20
Fee Schedule	30
Report samples	15
References	15
Total points Allocation	100

### 2.5 The Evaluation of RFP Responses

- ❖ An evaluation committee consisting of representatives of CASO will conduct the evaluation of the submissions.
- ❖ Submissions shall follow the prescribed format.
- ❖ All members of the evaluation committee will sign a confidentiality undertaking with CASO and will be required to keep all the information they acquire during the process of evaluating the submissions confidential.
- ❖ Submissions will not be opened publicly.

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- ❖ The evaluation committee will discuss their reviews and reach consensus on the ranking and ratings of each submission.
- ❖ During the evaluation, after the close date, the CASO may request that any proponent provide further clarification of any part of its RFSQ Submission. The evaluation of a Submission will include any clarifications provided in writing in response to questions posed by the CASO.
- ❖ Should conflict arise with respect to any aspect of this RFSQ the Complaint Procedure as outlined in the CASO's policies and procedures will be followed.
- ❖ CASO reserves the right to permit a short period of time following the closing date to review minor irregularities and allow for corrections to be made.
- ❖ The Proponent is responsible to provide all information requested.

### SECTION 3- THE RFP PROCESS

#### 3.1 RFP Process Timetable

RFSQ Issue	November 20, 2015
Deadline for clarification and questions	November 27, 2015
Last date for addenda to be issued	December 4, 2015
Submission deadline for this RFSQ	December 7, 2015@4:00pm
Selection of qualified Proponents to this RFSQ	December 18, 2015
Notification of Vendor of Record List completed	December 22, 2015

#### 3.2 Questions

The Proponents shall submit all questions regarding this RFSQ prior to submission to the e-mail address noted. Responses will be provided to all interested parties with email address on file.

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